

Ex-Ante - Client Check-in

Last Modified on 26/05/2022 12:10 pm BST

Once all tabs have been reviewed and the Capacity for Loss statement has been completed, you can check the box next to the Investment:

Review

Select a wrapper to review the results, complete the capacity for loss statement and add commentary for compliance and reporting.

Mark as reviewed by selecting the checkbox for each item.

7IM Platform
7IM Platform

Individual Savings Accounts

Product
ISA (Stocks and Shares)

R.I.Y.	Final Value
0.46%	£61,734.86

Self Invested Personal Pension

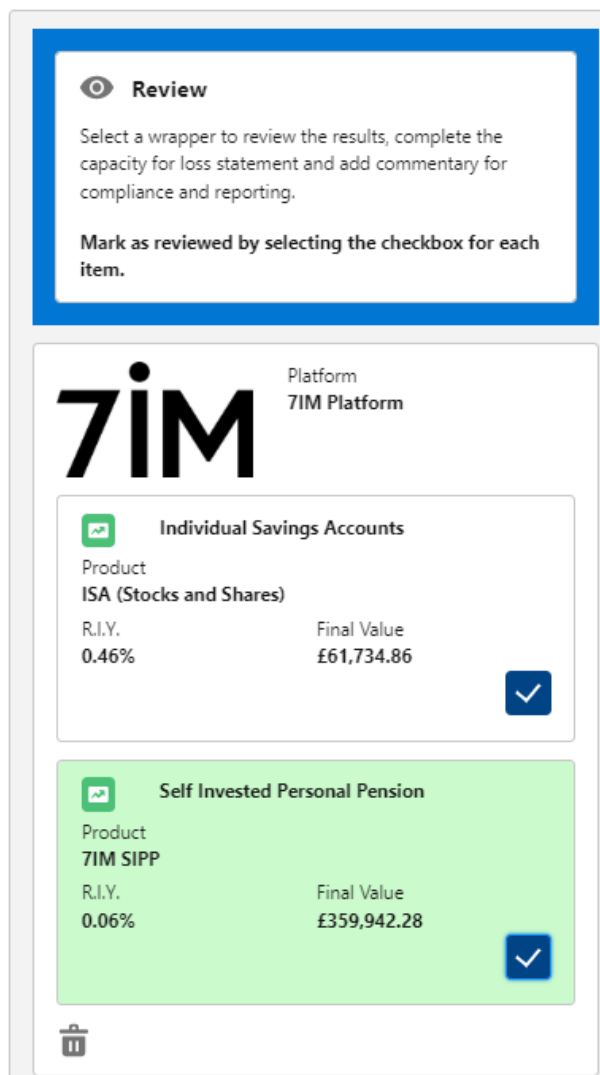
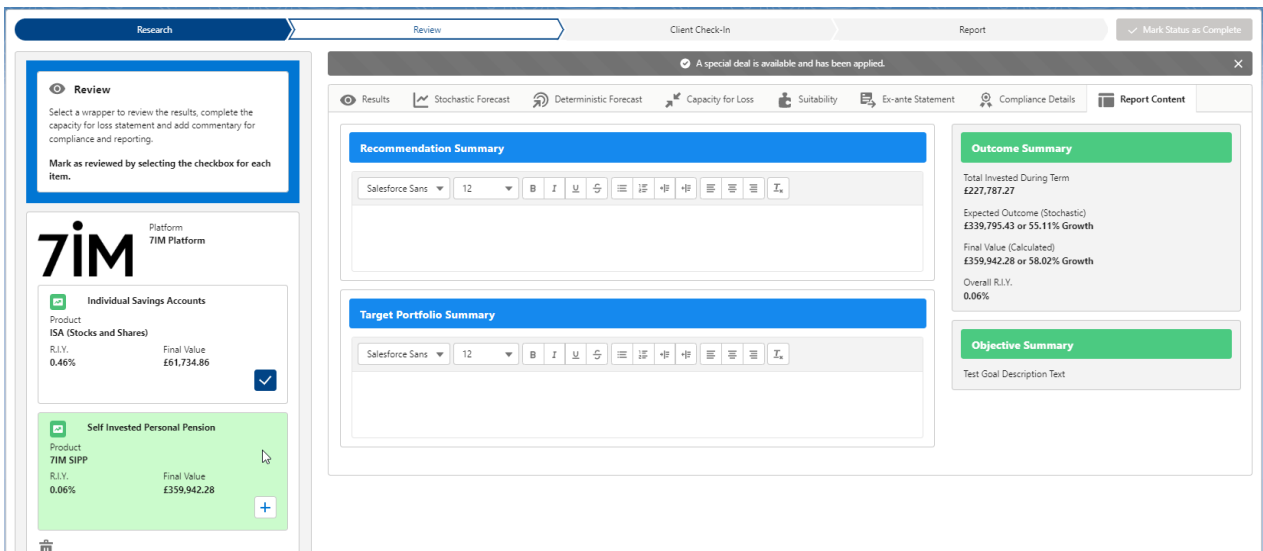
Product
7IM SIPP

R.I.Y.	Final Value
0.06%	£359,942.28

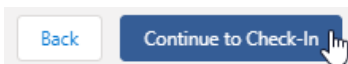
If this is the only investment, you can proceed to the Check-In stage.

If you have multiple investments, you will need to review each investment separately:

Repeat the review process, completing the Capacity for Loss statement before marking as reviewed.



All investments have been reviewed, proceed to the **Check-in** screen.



See article